# LEAD

**Life Event & Affinity Design**

# SUMMARY CONFERENCE PROCEEDINGS

## Sacramento • July 12, 2000

# SUMMARY CONFERENCE PROCEEDINGS

California Governor Davis has directed state government to improve effectiveness and provide better service by utilizing technology. This technology, called "eGovernment", includes a number of technology initiatives that are proposed or underway.

To be successful, eGovernment must be designed with the user in mind. On July 12, 2000 over 120 individuals began a design process in the groundbreaking Life Events and Affinity Design (LEAD) workshop. Sponsored by the Governor's Office for Innovation in Government, the primary goal was to leverage technology or eGovernment to break down bureaucratic barriers to customer service. Participants identified "life events," where citizens interfaced with government and then they considered current and possible future services associated with the event. Throughout the day the group responded to various questions enabling out-of-the-box thinking, logical sequencing and an opportunity to visualize uncomplicated access to government services.

A design team of private sector and state and local government representatives worked with the Governor's Office for Innovation in Government to define workshop objectives and affinities, or relationships of events that Californians typically experience. The group then invited a cross section of individuals; service providers, students, technologists and others with an interest in improving government services, to attend. The goal was to ensure a full spectrum of ideas.

Each of the day's activities provided insight, identified shortfalls and envisioned a new way of government doing business. The work product reflected Californians' day-to-day life experience.

After a short introduction and comments by Steven A. Nissen, Special Assistant to the Governor for Innovation in Government and Acting Director, Governor's Office of Planning and Research, the group began identifying key life events involving government.

## COMMON LIFE EVENTS INVOLVING GOVERNMENT

Participants were divided into ten groups.

Participants were asked to write down common life events that might trigger a need for government services. To assist in this thinking, the topic was divided into a timeline reflecting:

| | |
|---|---|
| Pre-Natal through Pre Teen | The 5Os and 6Os |
| Pre-Teen through 18 years | The 7Os through 8Os and beyond |
| 18 years through 21 years | Starting a Business |
| 21 years to 30 years | Non-age related events |
| 30 to 40-plus years | Professional Licensing |

Participants then moved to walls of paper and transcribed their thoughts. Some activities were applicable more than once and at various stages of life. Some were one-time occurrences. There were no right or wrong answers—just activities that could trigger the need for government services.

## DEVELOPING A STATE PORTAL

Participants then considered the idea of a "portal" and how it would help California's citizens access government services. A state portal was defined as a centralized location where information on government services could be accessed from a logical starting point. As an example, parts of a state portal could begin with "My Car" or "Education". It would be accessible through a variety of means, not just the Internet. It would be intuitive, easy to use and would enable individuals to obtain any of the information that they deemed appropriate to their specific circumstance.

## PORTAL DEMONSTRATION

The group viewed a sample state portal demonstration with the theme "Planning a vacation in the Redwoods." The journey began with a click on the state of California website. After selecting "Parks and Recreation," counties with redwood forests were then selected. The search was narrowed to three counties. Clicking on a county of choice, the portal, enabled by Internet technology, navigated to specific park information. While in the site, the participants saw how to secure a reservation, get driving directions and pay for the visit.

Then the portal offered other suggestions. For example, was there an interest in obtaining a fishing license, reviewing road conditions (just click on the road map); or checking the weather conditions on a weather site. It was even possible to access the local Chamber of Commerce and Visitor's Bureau to learn of local events. The entire trip could be planned without leaving the comfort of home.

## ANALYZING THE LIFE EVENTS

Participants then analyzed life events. Working in groups of ten, each group taking a section of the time line, the participant-stakeholders then reported on the various themes for their particular category.

There were some obvious themes…

### Pre-Natal through Pre-Teen

This group underscored the importance of health services and education. Under health, areas of concern were:

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|---|---|
| pre-natal care | physical education |
| childbirth classes | emergency health care |
| immunization | maternity/paternity leave |
| early childhood behavior | physician selection |
| parenting education | genetic screening |
| nutrition | |

Regarding education the following issues were ranked at the top of the list:

| | |
|---|---|
| special education | access to libraries |
| statewide testing | school enrollment |
| school report cards | after school care |
| learning to read | early literacy |

**Pre-Teen to 18 Years:**

This group continued to show a more pronounced emphasis on education with health a close second. The focus was on college entrance requirements; library services; job counseling; internships; learning skills; SAT scores; work permits; scholarships and financial aid. Health concerns cited were pre-natal care; significant physical changes; teen pregnancy; paternity; STD/AIDS testing; birth control; nutrition programs and pediatric obesity.

In this group there was an increased need for the following social services:

| | |
|---|---|
| social security cards | child support |
| Child Protective Services | mental health needs |
| latch key kids | depression |
| special behavior problems | eating disorders |
| child care | peer pressure |

The justice system entered into this age group with issues related to being victims of crime or abuse; gang related issues; violence; presence of sexual predators; and risk taking behaviors.

The impacts of technology were also noted.

**18 Years to 21 Years**

A shift began to occur in this age group towards adult responsibilities which crept into the listings. This age group began to focus on debt, credit cards and car loans; income taxes; voter registration; other fees; affordable housing or apartments. They began to think about career choices and some thought of embarking upon public service, apprenticeships, and volunteer opportunities. Health still dominated with education, social services and technology still strong in the mix of life events.

**21 Years to 30 Years**

This group was fully engaged in adult responsibilities. They were interested in marriage and divorce; child rearing and elementary school enrollment. Items of interest that were identified included requests for information on how to: buy a house; buy a car; file for bankruptcy; and debt management. The following were listed as part of their life events: name changes, family protection; investment decisions; child care; home repairs; insurance coverage; parenting; business loans; running for public office; health insurance; professional certificates; taxes and financial planning. Career decisions surfaced as a secondary emphasis.

**The 30s and 40 Plus Years**

This group began to identify long term care issues; advanced directives; hormone replacement and alternative medications as potential life events. There was increased emphasis on the justice system including parole; auto accidents; litigation; incarceration; domestic violence; law enforcement and crime. Recreation was more available but career decisions and adult responsibilities continued to require significant attention within this group.

### The 50s and 60s

Emotional issues such as loss of a spouse, a child or a friend began to surface in this age group. Many individuals were caring for grandchildren or aging parents. Illness might become a dominating factor with decisions about hormone replacement; chronic illness; residential care; respite care; living alone and care provider support. Recreation and retirement planning became more pronounced with travel; leisure interests; vacation homes; passports and visas surfacing on the list of events. Community service and volunteerism were cited as well as social security issues and unemployment or new employment opportunities.

### The 70s

Eldercare, senior nutrition programs; long-term care; home-based support; loss of independence; isolation; assisted living and impaired mobility, dominated this age group. Health issues surfaced with concerns such as the cost of prescription drugs, chronic illness and nutrition. Preservation of assets was identified to ensure long-term care, travel and social outlets. Mental health became an issue when spouses, friends and loved ones passed away and dependence upon others became a necessity.

### The 80s

Health was the dominating factor—but while healthy, marriage, new careers and recreation were also charted as life events. The need for community services became more pronounced with assisted living; adult day care; transportation assistance; home repairs; age-appropriate recreational activities ranking high among the needs for this age bracket. Crime became more of a problem as did poverty and injury prevention.

### Starting a Business

Licensing, certification, permitting, business structure and business processes dominated the group's issues. The main request was a centralized location where all forms, paperwork and requirements would be available in one location. Cited as a concern was recruitment and retention of qualified workers; land and transportation issues and the various types of insurance coverage required for business operations.

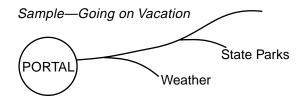### Non-Age Related and Professional Licensing

The last group related the cumbersome bureaucratic processes that needed to be eliminated or streamlined. Some life events triggered basic subsistence needs such as public housing, drug and alcohol assistance, or highlighted quality of life issues such as water purity; food; communicable diseases; neighborhood nuisances; and air pollution. Health issues surfaced again as a primary trigger for a life event as well as issues related to the justice system, the courts, victim assistance and probation. Day-to-day business needs of licensure/employee retention and credit/debt were discussed.

### INFORMAL DISCUSSION

Participants were encouraged to meet one another and continue informal discussion during a buffet lunch. Many participants found the interaction with one another as useful as the workshop itself.

## MIND MAP

After lunch participants began mapping possible state portals. Thinking of life events instead of an existing bureaucracy, they were asked to create a place on the Internet where someone might seek services. Participants were to create names for the places and describe the helpful information or services that would be there.

*Sample—Going on Vacation*

PORTAL

State Parks

Weather

Working together, participants focused on the 8' x 16' board in the front of the meeting room. They were asked to first identify the branches on a tree that would be major issues related to the life events. They were then asked to indicate limbs or twigs that sprouted from the branches.

With each suggestion a physical vision to provide easier access to government services began to emerge. There was no critique or censorship of ideas. All concepts merited a place on the map.

Along with the map, the energy in the room continued to build. When it came time to complete the activity individuals were still adding ideas to the map. The facilitator then gave the group the option to continue writing or move to the next activity.

The overwhelming response was "Give us the pens." The group continued to write, expand, and identify new areas where a statewide portal could benefit life experiences.

Once done, participants were given color-coded stickers. They were asked to return to the map and put stickers on what they believed to be the most important areas to focus on in eGovernment development.

*"Give Us The Pens"*

## ANALYZING THE MAP

Divided into groups again participants were asked to analyze both the map and the votes (color coded stickers) that identified those areas emphasized as important.

Education and Health dominated the participants' interests. In looking at the map, the education branch reflected needs and interest in use of technology to better provide distance learning, community college services, tutoring, financial aid, special education, libraries and school infrastructure.

In the Health area participants clustered immunizations, communicable diseases, health providers, physician access, insurance, public health, rural health and alternative medicine as important.

Eldercare (adult day care, respite, transportation services, nursing homes), Local Government (emergency response, traffic control, zoning, licensing) and Civic Participation (mentoring, community participation, volunteerism, and advocacy) ranked in the second highest tier.

Some obvious voids were identified. There was a noticeable absence of Arts and Culture, Agriculture, Commerce and Trade and Energy issues. The Environmental area was also less developed. Few of the attending participants were involved in these arenas. Future workshops will include stakeholders from those constituencies.

A copy of the Mind Map can be viewed on the website**.**

## STAKEHOLDER ANALYSIS

The next activity reorganized participants into stakeholder groups specific to their areas of expertise. Considering areas of emphasis on the map, participants identified how services are currently delivered, and what future service delivery should look like. Some highlights follow:

### Basic Subsistence (food, housing, transportation)

*Current*: Food services are not aggregated. There are different streams of funding and delivery is disjointed even though they are serving largely the same population.

*Future*: Seamless, coordinated services and delivery with a common application are the way of the future. The services and delivery systems would be technology-based with links to other sites of interest.

*Current*: Housing availability is limited and often substandard. There are often absentee owners.

*Future*: Availability of portal with links to data on the following: home ownership; access to affordable housing; adequate rentals; finding out about financing; links to other basic needs, e.g., employment, food, emergency shelter:

### Emergency Services and Law Enforcement

*Current*: Public misunderstanding about decentralized justice resources and about decentralized justice data.

*Future*: Trend toward non-traditional policing service: Intervention and Prevention vs. Enforcement and Reaction.

### Education

*Current*: There is a piecemeal approach to reform in isolated areas: pilot programs.

*Future*: An ability to address the needs of first time, disadvantaged students; align curriculum with assessment and teaching; individual learning plans and avoiding isolation.

### Environment

*Current*: While the environmental community was one of those under-represented in the workshop, participants did identify that the environment could be tied to the economic development of a community and should be used as an enhancement to bring businesses to communities.

*Future*: Services delivered need to be outcome-oriented. Services and expertise should be offered to other providers and community pockets of interest should be identified.

### Mental Health and Counseling

*Current*: Services are often delivered in the most expensive setting, e.g., emergency rooms, hospitals. Frequently services are not available geographically and insurance won't pay. There is often a stigma attached to mental illness and people are unwilling to seek help.

*Future*: Identify issues early and at a natural site; use an holistic family center approach; remove eligibility barriers that government and insurance put in place; prevention; deliver early intervention, and remove stigma.

### Organizational and Community Services

*Current*: Lack of seamless service and a lack of one-stop shops.

*Future*: Services should be organized by consumer's questions. Needs: resource bank, increased funding, more information for community based organizations and proactive outreach and funding by government to community based organizations.

### Students

*Current*: Students indicated issues with both a passé educational system and structure and how people view this system. They were dismayed at the conditions of the actual infrastructure and lack of supplies. They identified various issues within education such as food and transportation and a disjointed delivery of services.

*Future*: The participants wanted relevant subject matter, smaller class sizes, a scholarship database, libraries, and better record keeping which would facilitate transfer to schools in other locations. They saw clubs e.g., Key Club, Interact and 4H as supports to the learning experience.

### Local Government

*Current*: There is a disconnect between the levels of government.

*Future*: Local government wants to stay visible and involved. They were willing participants and wanted cooperative formats and cross-referencing of programs between the various jurisdictions. Local government wanted to access services on-line and wanted a statewide location identifier service.

### Research

*Current*: State information is not designed to be understood by the public. It is organized for departmental use and is sometimes linked to funding sources. It is difficult to interpret where to go for services. There are questions regarding the confidentiality of some materials.

*Future*: To give the ability to obtain information regardless of who collects and maintains the data. They envisioned one format that can be used by all agencies and were anxious to eliminate the silos of information.

### Information Technology

*Current*: Things are happening faster and are more complex. Data is still contained in silos

*Future*: Government stakeholders will have to modify policies. We do it all or we will be replaced, but we can't do it in a vacuum. We need standards, guidelines, and business responses.

### Small Business Community

*Current*: Services and certification procedures are scattered, there is a lack of market research and technology consulting. Programs and services differ between counties, which are different again from cities and also from the state entities. There is a large inconsistency between all of them. Basically there is a lack of coordinated services.

*Future*: The future will have a logical interface with government including feedback mechanisms indicating the effectiveness from the consumer perspective. There should be an existing consolidated contracting and procurement opportunity with all levels of government. A business center for licensing, certification and other businesses. A "virtual wizard" guiding program for Internet sites and business-related processes should be available.

## SUMMARY

The compilation of data began to take shape with the idea that a statewide portal, appropriately designed, would indeed provide easier access and better service. It also heightened the awareness that it would be a difficult undertaking but one that could be accomplished.

## CLOSING OUT THE DAY'S WORK…

The last activity was a survey of the participant groups. The groups identified barriers to the implementation of eGovernment and how the state of California could realistically begin to move eGovernment forward. Working as individuals and then in stakeholder groups, the participants answered the following questions:

*1. What would compel you to use electronic means to access government services?*
Convenience was the factor most sought after by stakeholders. Also cited was a one-stop shop and easy access.

*2. What do you perceive to be the primary inhibitor to accessing government services via electronic means?*
Participants thought the primary inhibitor to achieving this was lack of public sector readiness and the lack of hardware/equipment (infrastructure). Also indicated as a barrier was the unwillingness or inability to change quickly the way a department conducts business and/or provides services.

*3. Reflecting on your own organizations, how long do you think it would take before they would be ready and could execute electronic services to citizens?*
The majority of participants felt it would take their own organizations only one year to be ready to execute some level of electronic services to Californians.

*4. What role can your community of interest or organization play in helping to make electronic government a reality?*
A number of ideas were put forth including comments such as:
"We've got the building blocks and the comprehensive community service data base."
"We can provide the interface between industry and government."
"Participate in group sessions like today and evaluate and test new government processes."
"Educate our patients and consumers on accessing eGovernment."
"Help to develop user-friendly language."
"Policy makers and taxpayers must understand this is the cost of doing business…"
"Distribution of free computers to low income households."
"Easy access…"
"Everyone agreed there needs to be more linkages of services…"

*5. Based on today's activities what is the most exciting outcome for future planning?*
"There is potential for great partnering locally and statewide…"
"Coordination with local government and community-based organizations.
"Cross systems dialogue."
"Opening up more possibilities for folks—engaging them in government."

Survey answers were compiled electronically as well as reported verbally. Participants were able to view the results on a large screen as each group reported.

## FUTURE PLANS

At least two more Life Events seminars are planned in the near future. Fresno is scheduled for October 5, 2000 and the Los Angeles activities will be held later in the month. Participants representing additional areas of interest will be invited.

Interested readers may also view a summary and photos from the Sacramento event on the website: http://www.iig.ca.gov

The gathered information is already being used in the design of the state government portal. In addition, this document and a film of the day's activities will be provided to executives to assist with creation of department specific eGovernment strategies.

Once the primary areas of focus are developed additional topic-specific planning sessions will be conducted. Participants are encouraged to remain involved with the planning process.

## THANK YOU

Lisa Beutler, Consultant to the Governor's Office for Innovation in Government and the workshop leader, and Steven Nissen thanked the group for their time and daylong effort. Also thanked were the design team and many other volunteers and sponsors that donated time and resources to the event. A list of participants, design team, and sponsors is attached.

## PARTICIPANTS

| | |
|---|---|
| Denise Adams-Simms | California Black Health Network Institution |
| Tony Aguilar | California Mental Health Association & Cal Works Project |
| Cliff Allenby | Department of Developmental Services |
| Guadalupe Alonzo | Mexican American Legal Defense Fund |
| Alex Amoroso | Association of Bay Area Governments |
| Johanna A-Anderson | California Conference of Local Health Department Nutritionists |
| Judy Asazawa | Asian Pacific Community Fund |
| Augie Bareno | Chicano Federation, San Diego County |
| Bonita Barnes | Planned Parenthood Affiliates of California |
| Maureen Borland | Human Services Agency |
| Anna Brannen | Legislative Analyst's Office |
| Rod Brawley | Dept. of Education, Specialized Media & Technology |
| Ronald Brean | Department of Parks and Recreation |
| Duwaye Brooks | Department of Education, School Facilities Planning |
| Alicia Bugarin | California State Library |
| Will Bush | Franchise Tax Board |
| Christopher Cabaldon | California Community Colleges |
| Diana Caldas | Air Resources Board |
| Peter Carey | Self-Help Enterprises |
| Margaret Clausen | California Hospice & Palliative Care Association |
| Bob Conheim | Department of Information Technology |
| Jack Corrie | CalPERS |
| Eli Cortez | Department of Information Technology |
| Ruth Cummings | The Birth Center |
| Bob Dell'Agostino | Health & Human Services Agency Data Center |
| Susan DeMarois | California Council of the Alzheimer's Association |
| Bill Dombrowski | California Retailers Association |
| Duane Farnham | BEA Systems, Inc. |
| Paul Feyling | County of San Mateo |
| John Fleischman | Sacramento County Office of Education |
| Carol Freels | California Dept. of Health Services, Office of Long Term Care |
| Ron Freitas | Stanislaus County |
| Laura Froome | Governor's Office of Criminal Justice Planning |
| Jack Fujimoto | L.A. County Colleges, Evaluation & Planning |
| Joyce Fukui | California Department of Aging, Long Term Care & Aging Services |
| Carol Gibson | CARTA, Inc. |
| Rich Gordon | San Mateo County |
| Sweet Alice Harris | Parents of Watts (Working with Youth & Adults) |
| Dan Harrison | California League of Cities |
| Ed Hatzenbuhler | Long Beach Police Department |
| Kenneth Hecht | California Food Policy Advocates |
| Paul Helliker | Department of Pesticide Regulation |
| Steve Henderson | Department of Education |
| Tom Henry | Fiscal Crisis & Management Assistance Team |
| Jonathan Hicks | California Department of Education |
| Mitzi Higashidani | Public Employees Retirement System |
| Susan Hildreth | San Francisco Public Library |
| Gail Hillebrand | Consumer's Union |
| Barbara Hood | California Association of Homes & Services for the Aging |
| Dorothy Hunter | Department of Motor Vehicles |
| Fred Johnson | Health & Human Services Agency, Ca. Rural Health Policy Council |
| Ditas Katague | California Complete Count |
| Steve Keil | California State Association of Counties |
| David Knapp | Town of Los Gatos |
| Amber Lopez | California Institute for Rural Studies |

| | |
|---|---|
| Mari Lopez | NALEO |
| Kristen Lui | Rio Americano High School |
| Lauren Lui | Rio Americano High School |
| Susan Maddox | California Children's Hospital Association |
| Gerald Maginnity | Mountain Valley Library System |
| Justin Malan | California Conference of Directors of Environmental Health |
| Peter McNamee | Little Hoover Commission |
| Sara Matta | I & R Volunteer Services, United Way of San Diego |
| Jennifer McCarthy-Varni | META Group, Inc. |
| Patricia McFarland | Association of California Nurse Leaders |
| Mike Mellon | Monterey County Office of Education |
| Brian Micek | Governor's Office for Innovation in Government |
| Lydia Missaelides | California Association for Adult Day Services |
| Rita Mitchell | California Nutrition Council |
| Vincent Montane, Ph.D. | Department of Information Technology |
| Art Naldoza | La Cooperativa Campesina De California |
| Steve Nissen | Governor's Office for Innovation In Government |
| Michelle Ogata | Department of General Services, Small Business Council |
| Rev. Kate O'Leary | Trinity Methodist Church |
| Brian Oney | California Association of Homes and Services for the Aging |
| Marlene Parker | Long Beach Police Department |
| Paul Pendergast | Pendergast & Associates |
| Bob Pentz | Aerospace Corporation |
| Luther Perry | County of San Mateo |
| Jeff Pfeiffer | ETC Group |
| Mary Piasta | Governor's Office of Special Projects |
| Antonio Pizano | San Joaquin County Housing Authority |
| Dave Popham | Employment Development Department |
| Cristina Quontamatteo | Department of Health Services, Licensing & Certification |
| Carlos Ramos | Department of Social Services |
| John Riley | Monterey County Office of Education |
| Lynne Rogers | Los Angeles Urban League |
| Matt Rowan | Rio Americano High School |
| Randy Saffold | Community Technology Foundation of California |
| Sally Savona | Sacramento City Unified School District |
| Jerry Schmiedeke | Los Angeles Sherrif's Department |
| Mike Shellito | Roseville Parks & Recreation Department |
| Ralph Shoemaker | California Franchise Tax Board |
| Christina Smith | Sacramento Waldorf School |
| Margo Souza | Souza & Daughter's Dairy |
| Vicki Spannagel | Placer County Health & Human Services, Community Health |
| Kim Strange | Department of Housing & Community Development |
| Chuck J. Supple | California Commission on Improving Life Through Service |
| Leonard Syme | UC Berkeley, School of Public Health |
| Courtney Takashima | UC San Diego |
| Jean Tashima | C. K. McClatchy High School |
| Steve Treanor | California State Parks |
| Mel Voyles | Department of Mental Health, |
| Cathy Walters | Flintridge Consulting |
| Tom Warnack | Costa Mesa Police Dept. |
| Mary Weaver | Education Support Systems Division |
| Deidre Wentworth | Mercy Healthcare Stroke Center |
| Adelina Zendejas | Department of Information Technology |
| David Zochetti | Office of Emergency Services |

## DESIGN TEAM

| | |
|---|---|
| Donna Begay | California Conservation Corp. |
| Lisa Beutler | Governor's Office for Innovation In Government |
| Carole Chesbrough | Business, Tranportation & Housing Agency |
| Bob Chow | California Conservation Corps |
| Jerri Dale | Governor's Office for Innovation In Government |
| Fred Forrer | MGT of America |
| Coco Gumacal | Commission on the Status of Women |
| Shirley Harris | Department of Housing & Community Development |
| Mike Kassis | Office of Statewide Health Planning & Development |
| Linda Lipinski | BEST Consulting |
| Kathryn Lowell | MAXIMUS – Government Affairs |
| Kevin Matsuo | California Department of Education |
| Brian Melville | BEST Consulting |
| Bob Metzker | California Highway Patrol |
| John Moise | Department of Development Services |
| Julia Miranda-Bursell | Health & Human Services Data Center |
| Judy Nevis | Department of Housing & Community Development |
| JoAnne Payan | Department of Pesticide Regulation |
| Mary Purvis | Department of General Services, Procurement Division |
| Lou Rathbun | California Conservation Corps |
| Rose Schembri | Department of General Services, Procurement Division |
| Steven Steinbrecher | Contra Costa County |
| Mike Vega | California Highway Patrol |
| Bill Welty | Air Resources Board |
| Mary Winkley | MGT of America |

**BEA Systems, Inc.**

**CARTA, Inc.**

**MAXIMUS**

**META Group**

**BEST Consulting**

**MGT of America**